

Claims

What is claimed is:

- 5 1. A method of guiding an individual creating a new goal to facilitate alignment of the new goal, the method comprising:
- receiving user input from the individual relating to creation of the new goal in a goal management
10 system;
- ensuring that the new goal is a child goal of a parent goal in the goal management system;
- ensuring that the parent goal is linked to a team that includes the individual; and
15 storing the new goal, such that the goal management system accumulates a collection of goals and goal relationships for future reference.
2. The method of Claim 1, wherein ensuring that the
20 parent goal is linked to a team that includes the individual comprises:
- identifying multiple teams that include the individual; and
- prompting the individual to select one of the
25 multiple teams.
3. The method of Claim 2, wherein prompting the individual to select one of the multiple teams comprises automatically identifying a default team.

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4. The method of Claim 1, further comprising:

identifying one or more candidate parent goals
that are linked to the team that includes the individual;
and

5 prompting the individual to select a goal among
the one or more candidate parent goals to be the parent
goal to the new goal.

5. The method of Claim 4, wherein prompting the
10 individual to select a goal comprises automatically
identifying a default parent goal.

6. The method of Claim 1, further comprising:
prompting the individual to specify a team to
15 be linked directly to the new goal;
ensuring that the specified team is owned by
the individual; and
saving the new goal as a team goal for the
specified team.

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7. The method of Claim 6, wherein prompting the
individual to specify a team and ensuring that the
specified team is owned by the individual comprises:

25 identifying two or more teams owned by the
individual; and

prompting the individual to select the team to
be linked directly to the new goal from the two or more
identified teams.

8. The method of Claim 1, further comprising:

recognizing an organizational role for the individual; and

5 customizing content of a user interface, based on the organizational role of the individual, such that the user interface with the customized content provides goal creation guidance according to the organizational role.

10 9. The method of Claim 8, wherein customizing content of a user interface comprises providing specialized instructions and sample content for characteristics of the new goal.

15 10. The method of Claim 8, wherein customizing content of a user interface comprises:

retrieving a specialized template, based on a department and a job title for the individual; and

20 providing specialized instructions and sample content for characteristics of the new goal, based on the specialized template.

11. The method of Claim 10, wherein providing specialized instructions and sample content for
25 characteristics of the new goal comprises providing customized content for a goal-objective characteristic, a goal-measure characteristic, and a goal-activity characteristic for the new goal.

12. The method of Claim 1, further comprising prompting the individual to select a category for the new goal from a list of high-level goals.

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13. A method of guiding goal creation according to approved relationships between goals, teams, and individuals, the method comprising:

- 5 authenticating an individual, based on a user identifier;
- retrieving an organizational profile for the individual, based on the user identifier, wherein the organizational profile includes a department for the individual in an organization and a job title for the individual in the organization;
- 10 receiving a request from the individual to begin creating a new goal;
- identifying a first team as a default team to be associated with the new goal;
- 15 receiving input from the individual identifying a second team to be associated with the new goal in lieu of the first team;
- prompting the individual to select between creating the new goal from scratch and copying the new goal from an existing goal;
- 20 in response to the individual selecting to copy the new goal from an existing goal, presenting a search interface that includes default values for search parameters, wherein the default values are based on the department, the job title, and a manager for the individual;
- 25 in response to the individual requesting a goal search from the search interface, returning a list of goals that match the search parameters of the search interface;
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in response to the individual selecting a goal
from the list of goals, copying content from the selected
goal into the new goal and providing at least one
interface for the individual to modify the content for
5 the new goal;

in response to the individual selecting to
create the new goal from scratch, retrieving a
specialized template based on the department and the job
title for the individual, wherein the specialized
10 template includes specialized instructions and sample
content for characteristics of the new goal, wherein the
characteristics with specialized instruction and sample
content include a goal-objective characteristic, a goal-
measure characteristic, and a goal-activity
15 characteristic for the new goal; and

presenting the specialized instructions and
sample content to the individual.

14. Software for creating goals that comply with approved relationships between goals, teams, and individuals, the software comprising:

means for ensuring that a new goal is a child
5 goal of a parent goal; and

means for ensuring that the parent goal is linked to a team which includes the individual.

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15. A program product for guiding an individual creating a new goal, the program product comprising:

computer instructions that:

5 ensure that the new goal is a child goal of a parent goal; and

ensure that the parent goal is linked to a team that includes the individual; and

a computer-usable medium encoding the computer instructions.

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16. The program product of Claim 15, wherein the computer instructions, which ensure that the parent goal is linked to a team that includes the individual, further comprise computer instructions that:

15 identify multiple teams that include the individual; and

prompt the individual to select one of the multiple teams that include the individual.

20 17. The program product of Claim 16, wherein the computer instructions, which prompt the individual to select one of the multiple teams, further comprise computer instructions that automatically identify a default team.

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18. The program product of Claim 15, wherein the computer-usable medium further encodes computer instructions that:

5 identify one or more candidate parent goals that are linked to the team that includes the individual; and

prompt the individual to select a goal among the one or more candidate parent goals to be the parent goal to the new goal.

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19. The program product of Claim 18, wherein the computer instructions, which prompt the individual to select a goal, further comprise computer instructions that automatically identify a default parent goal.

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20. The program product of Claim 15, wherein the computer-usable medium further encodes computer instructions that:

20 prompt the individual to specify a team to be linked directly to the new goal;

ensure that the specified team is owned by the individual; and

save the new goal as a team goal for the specified team.

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21. The program product of Claim 20, wherein the computer instructions which prompt the individual to specify a team and ensure that the specified team is owned by the individual comprise computer instructions
5 that:

identify two or more teams owned by the individual; and

prompt the individual to select the team to be linked directly to the new goal from the two or more
10 identified teams.

22. The program product of Claim 15, wherein the computer-usable medium further encodes computer instructions that:

15 recognize an organizational role for the individual; and

customize content of a user interface, based on the organizational role of the individual, such that the user interface with the customized content provides goal
20 creation guidance according to the organizational role.

23. The program product of Claim 22, wherein the computer instructions, which customize content of a user interface, further comprise computer instructions that
25 provide specialized instructions and sample content for characteristics of the new goal.

24. The program product of Claim 22, wherein the computer instructions, which customize content of a user interface, further comprise computer instructions that:

5 retrieve a specialized template, based on a department and a job title for the individual; and provide specialized instructions and sample content for characteristics of the new goal, based on the specialized template.

10 25. The program product of Claim 24, wherein the computer instructions which provide specialized instructions and sample content for characteristics of the new goal comprise computer instructions which provide customized content for a goal-objective characteristic, a
15 goal-measure characteristic, and a goal-activity characteristic for the new goal.

26. The program product of Claim 15, wherein the computer-usable medium further encodes computer
20 instructions that prompt the individual to select a category for the new goal from a list of high-level goals.

27. The program product of Claim 15, wherein the
25 computer-usable medium comprises a member selected from the group consisting of (i) electronic signals modulated in accordance with the computer instructions, (ii) magnetic readable storage material, (iii) optically readable storage material, and (iv) optical signals
30 modulated in accordance with the computer instructions.

28. A method of aligning, in a goal management system, a new goal of an entity, the method comprising:

receiving user input from an individual relating to creation of the new goal;

5 ensuring that the new goal is a child goal of a parent goal in the goal management system;

ensuring that a group is linked to the parent goal;

10 ensuring that the entity is subordinate to the group; and

storing the new goal in the goal management system, such that the goal management system accumulates a collection of goals and goal relationships for future reference.

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29. The method of Claim 28, wherein:

the entity is an individual;

the group is a team; and

the new goal is a team-related goal.

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30. The method of Claim 28, wherein:

the entity and the group are teams; and

the new goal is a team goal.

31. A method of facilitating contextual alignment of a new goal, the method comprising:

receiving user input relating to creation of the new goal;

5 recognizing an organizational role for an entity; and

customizing content of a user interface, based on the organizational role of the entity, such that the user interface with the customized content provides goal
10 creation guidance according to the organizational role.

32. The method of Claim 31, wherein customizing content of a user interface comprises providing specialized instructions and sample content for characteristics of
15 the new goal.

33. The method of Claim 31, wherein customizing content of a user interface comprises:

retrieving a specialized template, based on a
20 department for the entity; and

providing specialized instructions and sample content for characteristics of the new goal, based on the specialized template.

25 34. The method of Claim 33, wherein providing specialized instructions and sample content for characteristics of the new goal comprises providing customized content for a goal-objective characteristic, a goal-measure characteristic, and a goal-activity
30 characteristic for the new goal.

35. The method of Claim 31, further comprising:
ensuring that the new goal is a child goal of a
parent goal;
ensuring that a group is linked to the parent
5 goal; and
ensuring that the entity is subordinate to the
group.

36. The method of Claim 35, further comprising:
10 identifying multiple groups that include the
entity; and
prompting an individual to select one of the
multiple groups.

15 37. The method of Claim 35, further comprising:
identifying one or more candidate parent goals
that are linked to the group; and
prompting an individual to select a goal among
the one or more candidate parent goals to be the parent
20 goal to the new goal.

receive user input relating to creation of the

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    ensure that the new goal is a child goal of a
parent goal;

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10 cause the new goal to be stored, such that the
system facilitates goal alignment.

39. An apparatus comprising:

computer program instructions that generate an electronically displayable user interface which guides an individual creating a new goal, the user interface

5 comprising:

a first selection list which includes multiple teams that include the individual;

a second selection list which includes multiple goals associated with a selected team from the first

10 selection list; and

a continue button which, when selected, initiates creation of a new goal with a team link to the selected team and a parent link to a selected goal from the second selection list.

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40. An apparatus comprising:

computer program instructions that generate an electronically displayable user interface which guides an individual creating a new goal, the user interface

5 comprising:

specialized instructions and sample content for characteristics of the new goal, wherein the specialized instructions and sample content provide goal creation guidance according to a role of the individual within an
10 organization, such that the specialized instructions and sample content facilitate contextual alignment between the new goal and the role of the individual.

41. The apparatus of Claim 40, wherein the specialized
15 instructions and sample content are based on a department and a job title for the individual.

42. The apparatus of Claim 40, wherein the specialized instructions and sample content comprise customized
20 content for a goal-objective characteristic, a goal-measure characteristic, and a goal-activity characteristic for the new goal.